Oil & Gas
Global Supply Chain

OTM – VG
UK & Norway & Denmark

Approver User Manual

imagination at work

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1.0 Acronyms and key Terms

Acronyms

DOA : Delegation of Authority
EBS : Oracle E-Business Suite
ERP : Enterprise Resource Planning
FIR : Florence New Units
FTL : Full Track Load
GE : General Electric
GLS : Global Logistic Services
GS : Global Services
IN : Inbound
ITO : Inquiry to Order phase
LEC : Logistic Execution Center
LPN : LICENCE PLATE NUMBER, comes from ORACLE , it is the striker applied on each box externally
LT : Lead Time
LTL : Less than Track Load
LSP : Logistics Provider
MRP : Manufacturing Resource Planning
NP : Nuovo Pignone
NU : New Units
VG : Vecto Gray

OB : Order Base
OBL : Order Base Line
OAPPL : Oracle Application
OM : Order Management
OOG : Out of Gauge
OR : Order Release
OTM : Oracle Transportation Management
OTR : Order to Remittance phase
OUT : Outbound
PO : Purchase Order
PT : Premium Transport
RC : Routing Center
RFQ : Request for Quotation
RFT : Request for Transport
SC : Support Central
SO : Sales Order
SSP5 : Self Service Purchasing
STD : Standard
THU : Transport Handling Units
UI : User Interface
WF : WorkFlow

Key terms

- **Order Release** : it is an order or part of an order for transportation planning and execution

- **Order Release Ship Unit** : defines how goods will be shipped ex.: pallet, box, etc. with related details and dimensions

- **Order Release Line Item** : it is the item list inside a box for transportation of related Ship Unit

- **Premium Transportation** : this is the transportation cost when a lower alternative price exists. Higher price for premium transportation is often due to very tight date for transport.

- **Job**: this object is created by Requestor, and it is a group of Order Releases which will be sent to the cost assignment and approval process; a Job can group together different ORs with different locations, dates and incoterms. The job is created for the approval of the transport requests.

Please see inside OTM - Help option Glossary for more details and drill down on these subject.

Key terms

- **Cost Calculation & Approval Control** : each Job will be submitted to Cost Assignment process (OTM will provide standard cost when rates are available or SPOT Cost, while the Execution center will provide cost if standard rates are not available); the job will be self-approved if the transportation cost is less then 2.000 euro, otherwise it should be approved from one or more approvers based on their own DOA level

- **Approvals**
  - "Self-Approval" for transportation cost less than 2.000 euro
  - Standard transportation with higher cost than 2.000 euro
  - Premium transportation with extra cost/urgency approval

- **Logistic Execution Center** : organization to manage transports during consolidation steps of OR after Job approval process, spot quotes generation, buy shipment creation, tender execution and carrier mgmt., extra costs control and creation management

Please see inside OTM - Help option Glossary for more details and drill down on these subject.

Key terms

- **Sell Shipment** : a grouping of ORs inside a Job with compatible locations and data in order to compute transportation costs

- **Buy Shipment** : this is the Transport Request, RFT. The shipment is a set of goods to be transported by the carrier from a location to another. A Shipment contains one or more Order Releases with compatible pickup and delivery date and same source and destination location

- **Cost Calculation** : this is the transportation cost of the Shipment (Sell/Buy) computed based on ORs information, as Transit Time (time between Early Pickup Date and Late Delivery Date), Pre-alert (time between Shipment creation and Pickup Date), locations distance, weight and dimensions

- **Spot** : if conditions on Order Releases are not compatible with any of the standard predefined cost inside OTM or there is no RATE in the system for the kind of transportation, then the cost will be defined as spot cost and cost will be assigned by the Execution Center

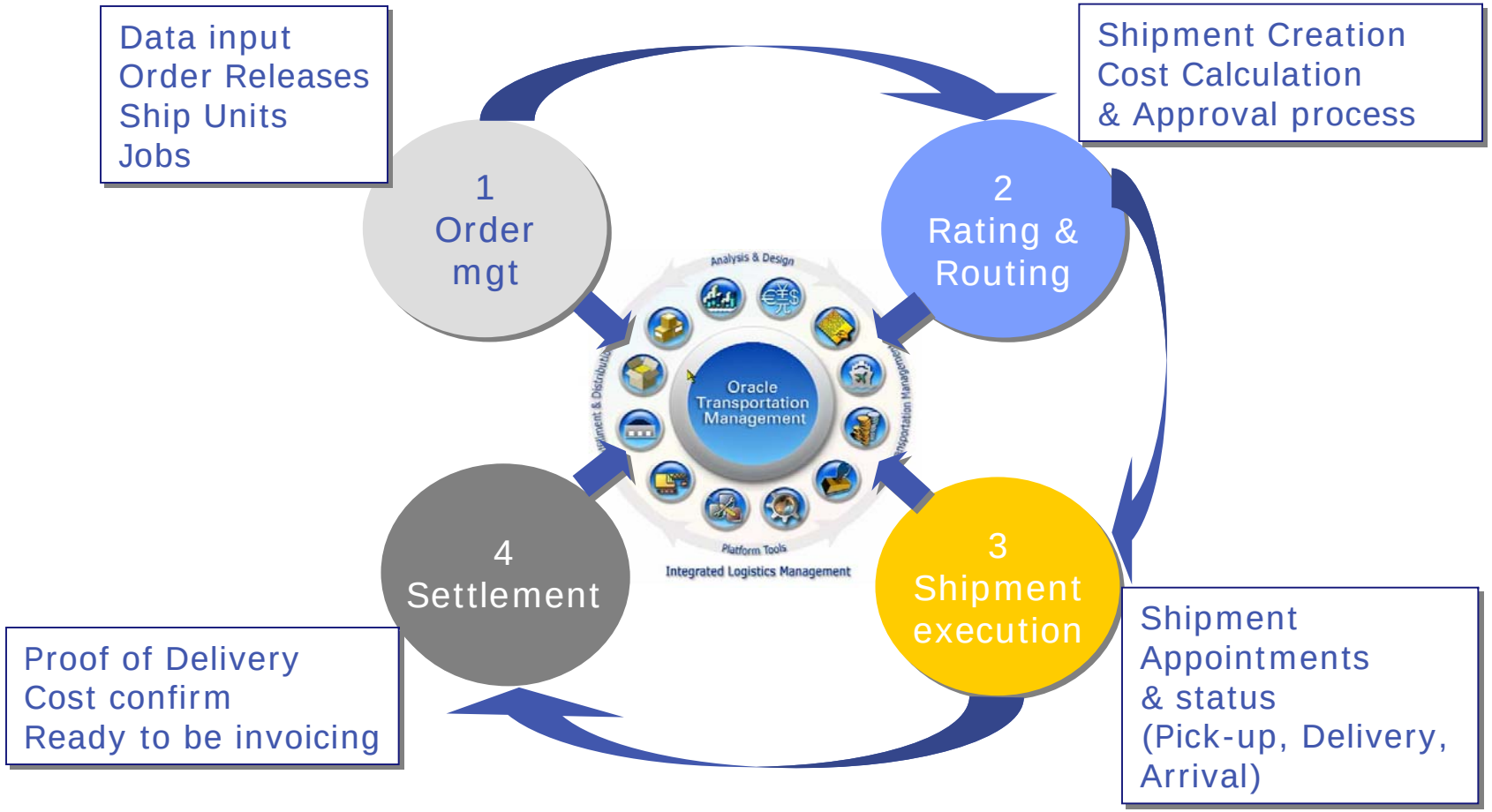
Please see inside OTM - Help option Glossary for more details and drill down on these subject.

Key terms

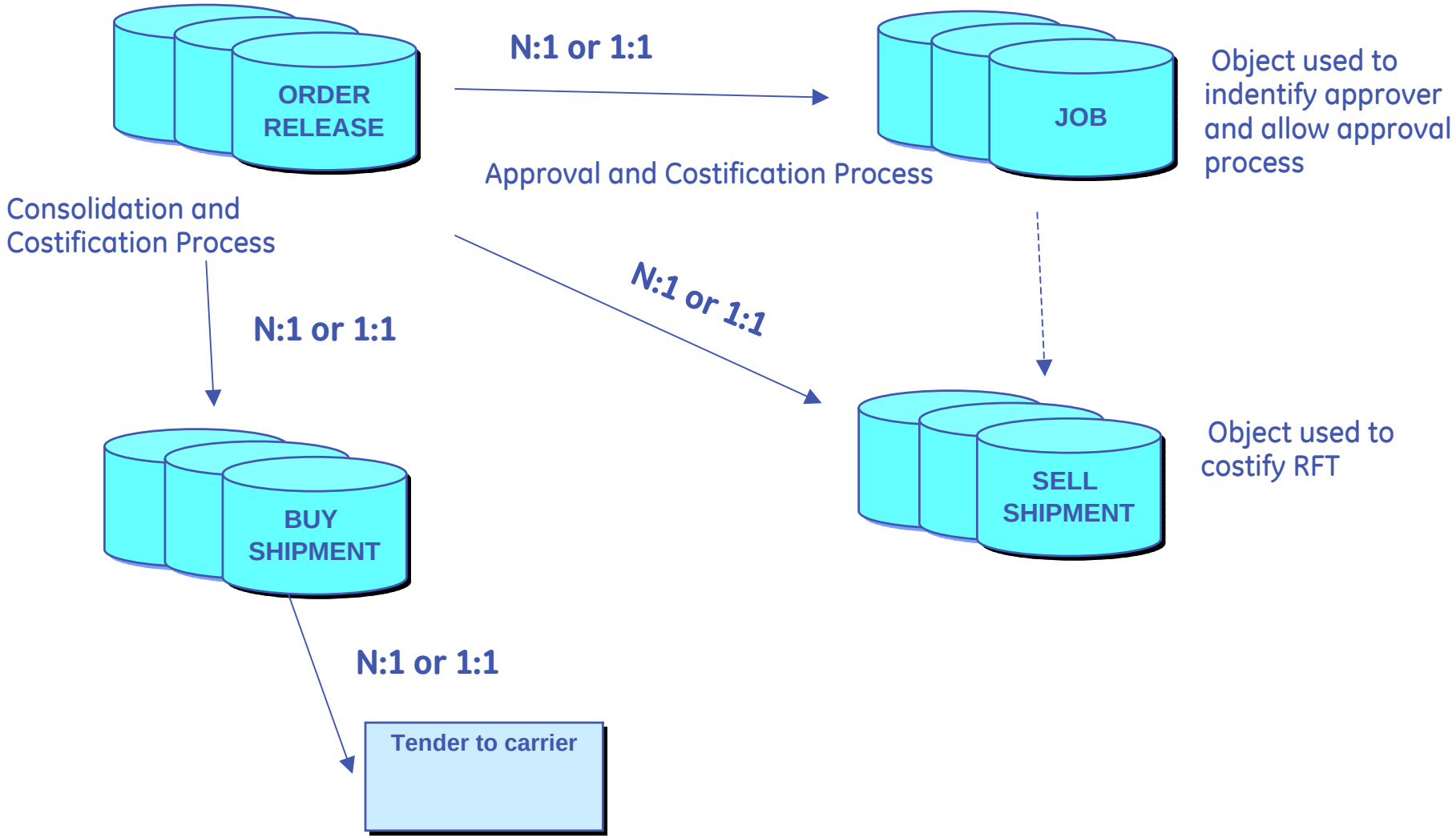
- **INBOUND:** shipment from external location to VG plant
- **OUTBOUND:** shipment from internal location to external (customer)
- **FARM-OUT:** subcontract work on material (from plant to supplier and vice versa)

2.0 Process and Solution overview

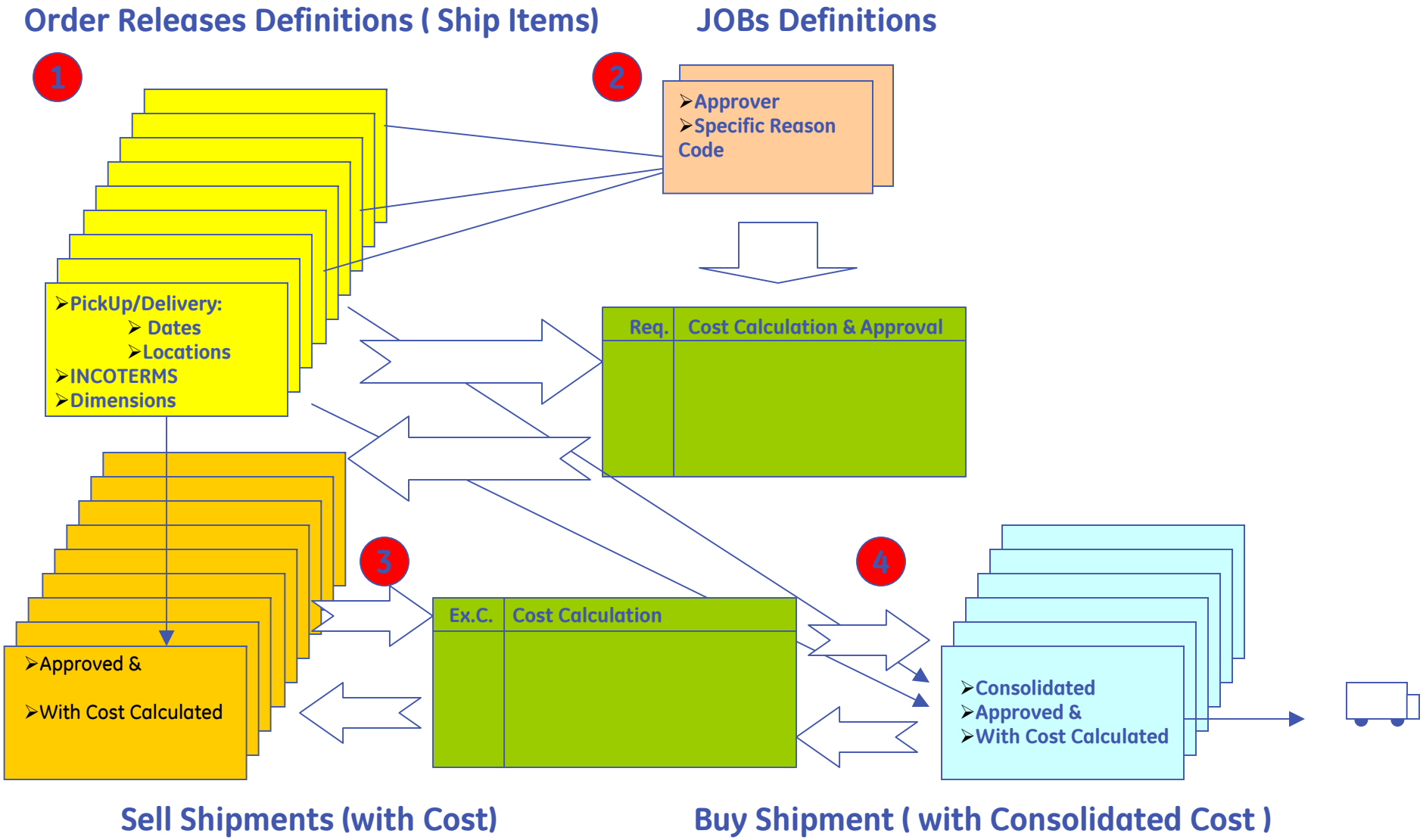
Process Overview



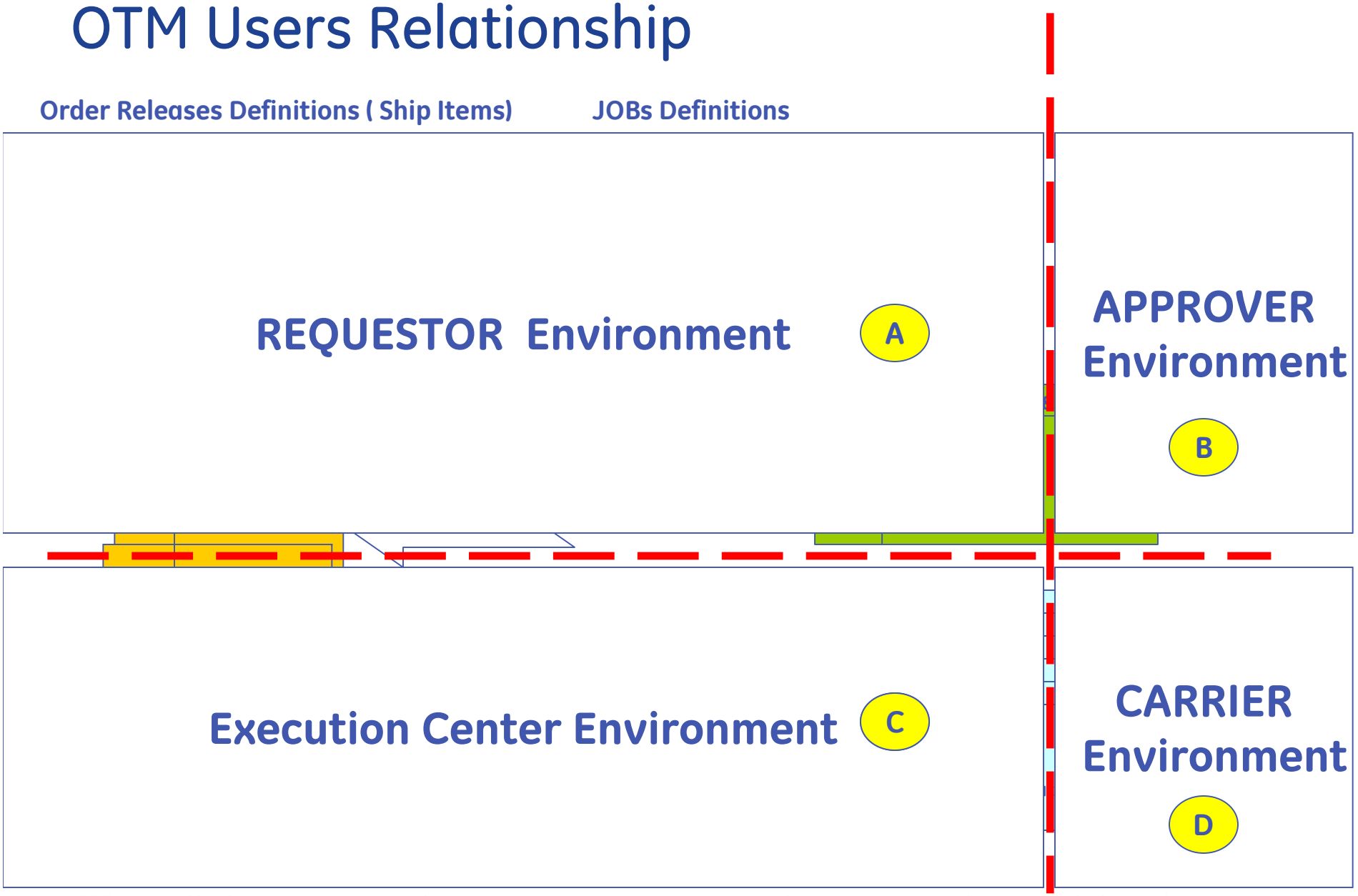
Relations between Key Objects in OTM



OTM Data Structure



OTM Users Relationship



OTM Users /Roles Overview

Role	Description
REQUESTOR (GE)	Can create OR(s) in the system and change it's OR(s) only Can create JOB(s) from OR(s) to be sent in APPROVAL/COST Allocation This will create Sell Shipment with cost assigned, managed later by LEC
REQUESTOR (non GE)	Can create OR(s) in the system and change it's OR(s) only Can create JOB(s) from OR(s) to be sent in APPROVAL/COST Allocation This will create Sell Shipment with cost assigned, managed later by LEC
SUPER REQUESTOR	Can create OR(s) and change it and also OR(s) of other requestors Can create JOB(s) from OR(s) to be sent in APPROVAL/COST Allocation Able to view everything in OTM
APPROVER (GE)	Can read all JOB(s) Can approve/refuse only JOB(s) of his/her own competence for : • Standard COST(> 2000E) • Premium Transportation
Logistic Execution Centre (LEC)	Can access only SS created by COSTING Allocation Process of JOB(s); can assign SPOT Cost and create/manage TENDER(s) and create consolidated Buy Shipment to be assigned to CARRIER for Execution
GE Logistic Execution ADMIN (LEC)	Can access only SS created by COSTING Allocation Process of JOB(s); can assign SPOT Cost and create/manage TENDER(s) and create consolidated Buy Shipment to be assigned to CARRIER for Execution Able to confirm buy shipment ready to be invoiced
CARRIER	Can accept TENDER(s) from LEC and update cost and dates, uploading POD, Delivered action Can access / execute only BS of his/her own competence
ADMINISTRATOR	IM role for development and set up system
VIEWER	Able to view everything in OTM Not able to make action in OTM

3.0 Approval process

Job Management

A Job is a set of Order Releases, created by the Requestor, to be costified and to be send to cost approval process.

The requestor can assemble, in a single Job, Order Release with different location, date and Incoterm.

After the Job has been created, the requestor should submit it to the approver who will accept or refuse its cost and other controls will be applied (if required).The full process will be explained in this chapter.

Costs assignment & Approvals

For each Job costs will be assigned (from OTM with a standard values or from the Execution Center if a std cost it is not applicable); if that cost is under 2.000 euros it will be self approved, otherwise it requires to be approved from one or more approver.

A Job can be submited for two different types of approval:

- Job: transport cost based on approver's DOA level
- Premium: extracosts/urgency approval

The approval process is started by the requestor when he/she request cost assignment to the Job via Action named Bulk Plan - Sell.

In case of "self approval" the Approver receives a notification via mail.

Costs assignment & Approvals

From its creation till the approval process, a Job will be in one of the following status (JOB_APPROVAL_STATUS) :

- **JOB_APPROVAL_NEW** : job has been created but requestor did not yet started the cost assignment process

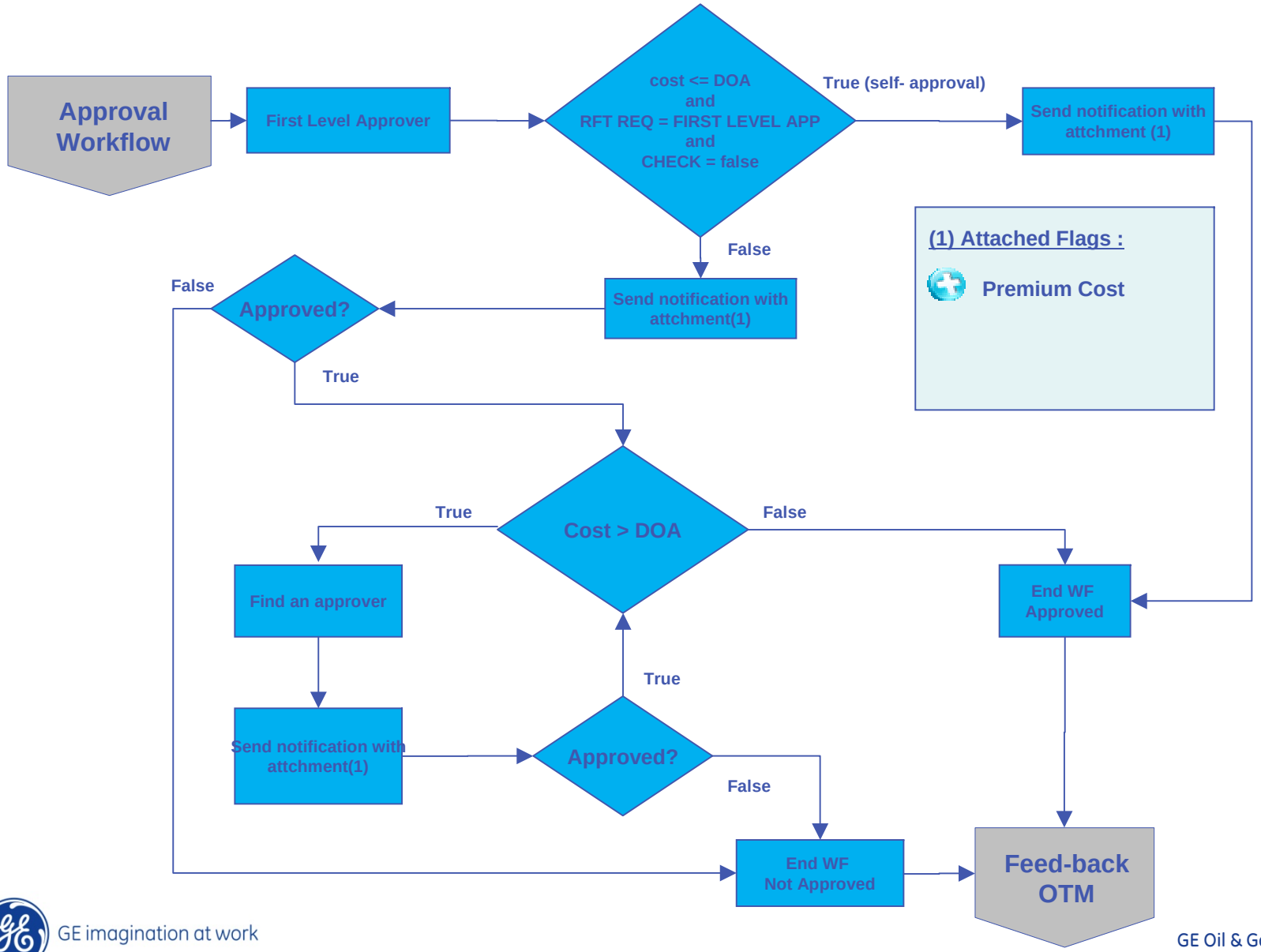
- **JOB_APPROVAL_TO_REVIEW** : the job has been submited to the cost assignment process but OTM was not able to assign costs. In this case the Execution Center will assign the cost to the Job.

- **JOB_APPROVAL_IN_APPROVAL** : the job has been submited to the cost assignment process form requestor and it is waiting for approval

- **JOB_APPROVAL_APPROVED** : the job has been approved by approver.

- **JOB_APPROVAL_REFUSED** : the job has been refused by approver

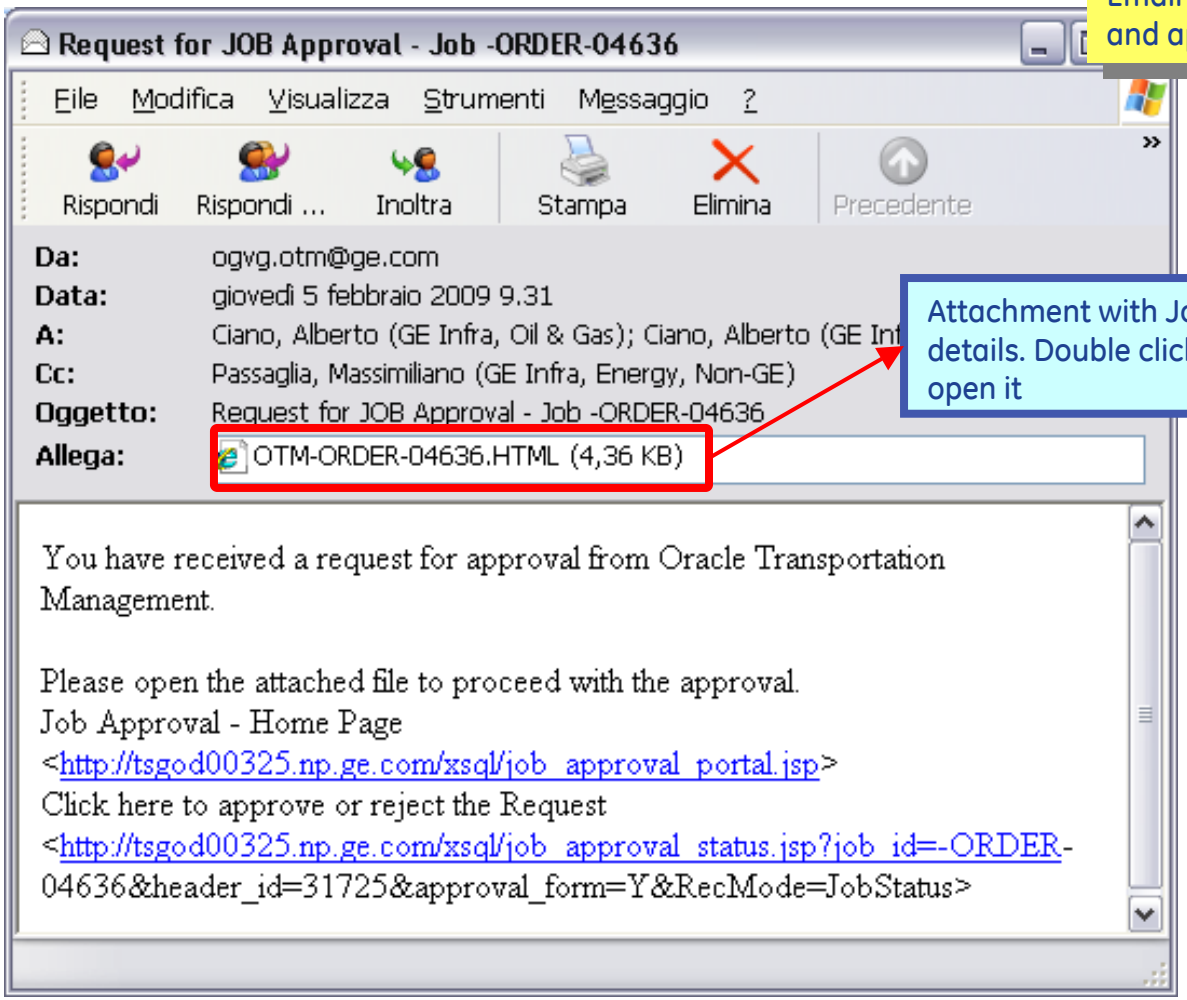
Approval Process



Job Approval

Note

Email sent by OTM to requestor and approver.



Attachment with Job details. Double click to open it

Job Approval

Note

E mail attachment sent to the approver.

OTM Request for Cost Approval

JOB Number:-ORDER-04636
JOB Amount: 7,500.00 EUR
JOB Type: INBOUND
Requestor: SCRAGG ADAM
Request Date: 05-FEB-09

Total Job transportation cost to be approved

Customer	Order Release	Weight	Dimension	Project	Pickup Date	Delivery Date	Price	Sell Shipment
VETCO AIBEL	20090204-000151	KG 2,500.00	H W L	906325-04.02	18-FEB-09	25-FEB-09	7,500.00 EUR	0109907

Shipments Informations

Sell Shipment	From	To	Rate Type	Ship Unit	Price	Alternative
0109907	VETCOGRAY SPELHAUGEN	VETCO AIBEL	ALLYN_SPOT	2	7500	

Click to approve or reject the Request.

To be selected to approve/refuse the JOB

Job Approval

Selecting the “CLICK” button on the attacment, a new page pops up…

BPEL_QA_VG
OTM JOB Approval Status
JOB Status
Please Approve or reject the JOB
SSO 105702599
Job ID -ORDER-04636
Premium Reason - Not Selected -
Free note
Approve
Reject
Please, scroll down to see details
Note
Scroll down the page to see all information about transportation request.
In case of Premium the approver can modify the reason entered by Requestor
To approve the Job
To refuse the Job
GE imagination at work

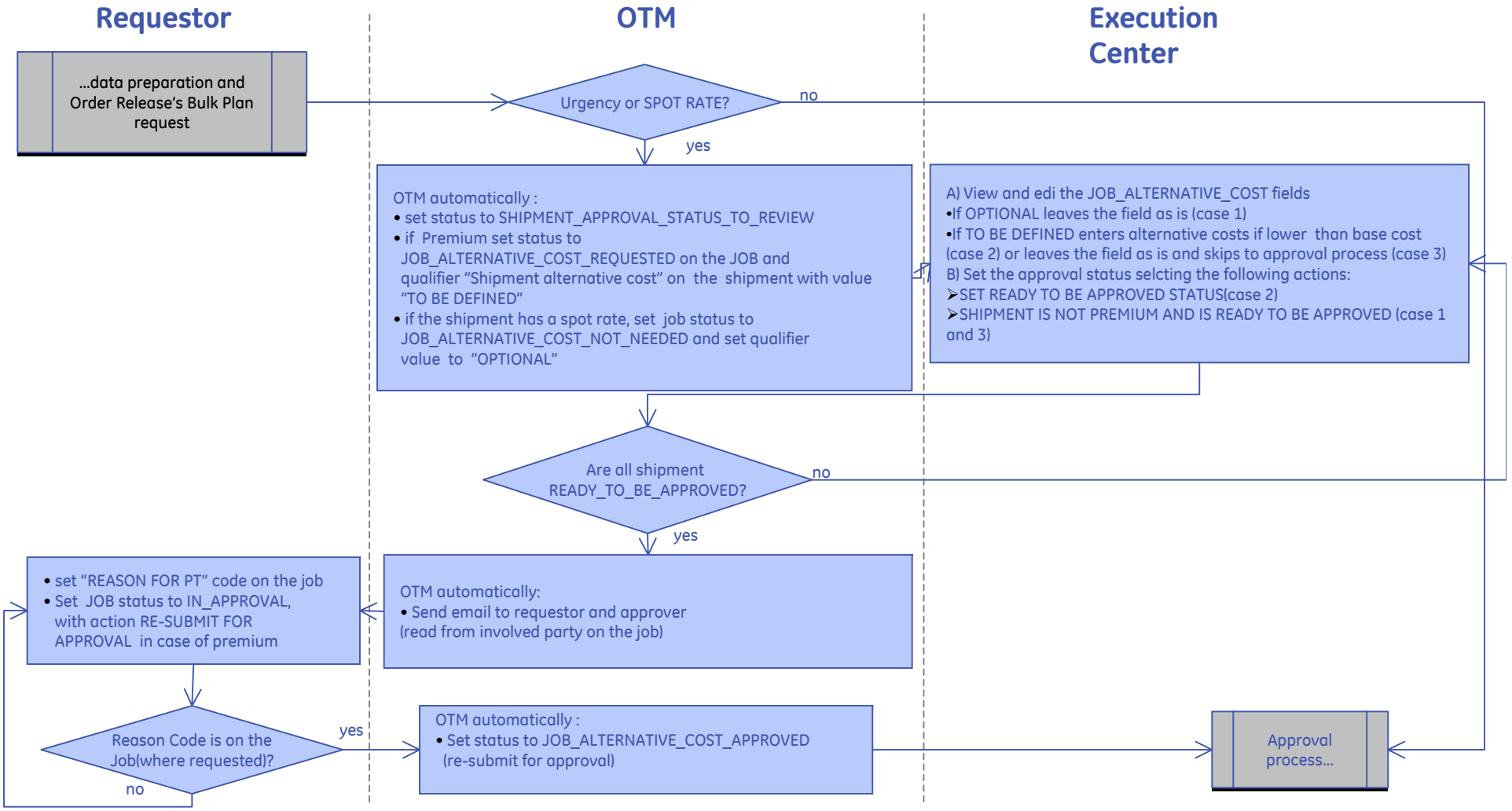
… after this action OTM gives confirmation of action execution.

3.1 Premium

Premium process

Note

Premium rates to be defined during rates analysis


Requestor
OTM
Execution Center
...data preparation and Order Release's Bulk Plan request
Urgency or SPOT RATE?
no
yes
OTM automatically :
• set status to SHIPMENT_APPROVAL_STATUS_TO_REVIEW
• if Premium set status to JOB_ALTERNATIVE_COST_REQUESTED on the JOB and qualifier "Shipment alternative cost" on the shipment with value "TO BE DEFINED"
• if the shipment has a spot rate, set job status to JOB_ALTERNATIVE_COST_NOT_NEEDED and set qualifier value to "OPTIONAL"
A) View and edi the JOB_ALTERNATIVE_COST fields
•If OPTIONAL leaves the field as is (case 1)
•If TO BE DEFINED enters alternative costs if lower than base cost (case 2) or leaves the field as is and skips to approval process (case 3)
B) Set the approval status selcting the following actions:
➢SET READY TO BE APPROVED STATUS(case 2)
➢SHIPMENT IS NOT PREMIUM AND IS READY TO BE APPROVED (case 1 and 3)
Are all shipment READY_TO_BE_APPROVED?
no
yes
• set "REASON FOR PT" code on the job
• Set JOB status to IN_APPROVAL, with action RE-SUBMIT FOR APPROVAL in case of premium
OTM automatically:
• Send email to requestor and approver (read from involved party on the job)
Reason Code is on the Job(where requested)?
yes
no
OTM automatically :
• Set status to JOB_ALTERNATIVE_COST_APPROVED (re-submit for approval)
Approval process...

Premium

Note

Attachment of email sent to requestor and approver.

JOB Number:-ORDER-04626
JOB Amount: 5,000.00 EUR
JOB Type: INBOUND
Requestor: HALAND ARILD
Request Date: 04-FEB-09

Customer	Order Release	Weight	Dimension	Project	Pickup Date	Delivery Date	Price	Sell Shipment
VETCOGRAY SPELHAUGEN	20090204-000125	KG 2,501.00	H W L	906197-09.02	04-FEB-09	05-FEB-09	2,500.00 EUR	0109889
VETCOGRAY SPELHAUGEN	20090204-000125	KG 2,501.00	H W L	906197-09.02	04-FEB-09	05-FEB-09	2,500.00 EUR	0109889

Shipments Informations

Sell Shipment	From	To	Rate Type	Ship Unit	Price	Alternative
0109889	FERGUSON NORGE	VETCOGRAY SPELHAUGEN	ALLYN_SPOT	1	5000	

Warranty

Premium Rate

Click to approve or reject the Request.

Cost entered by Execution Center

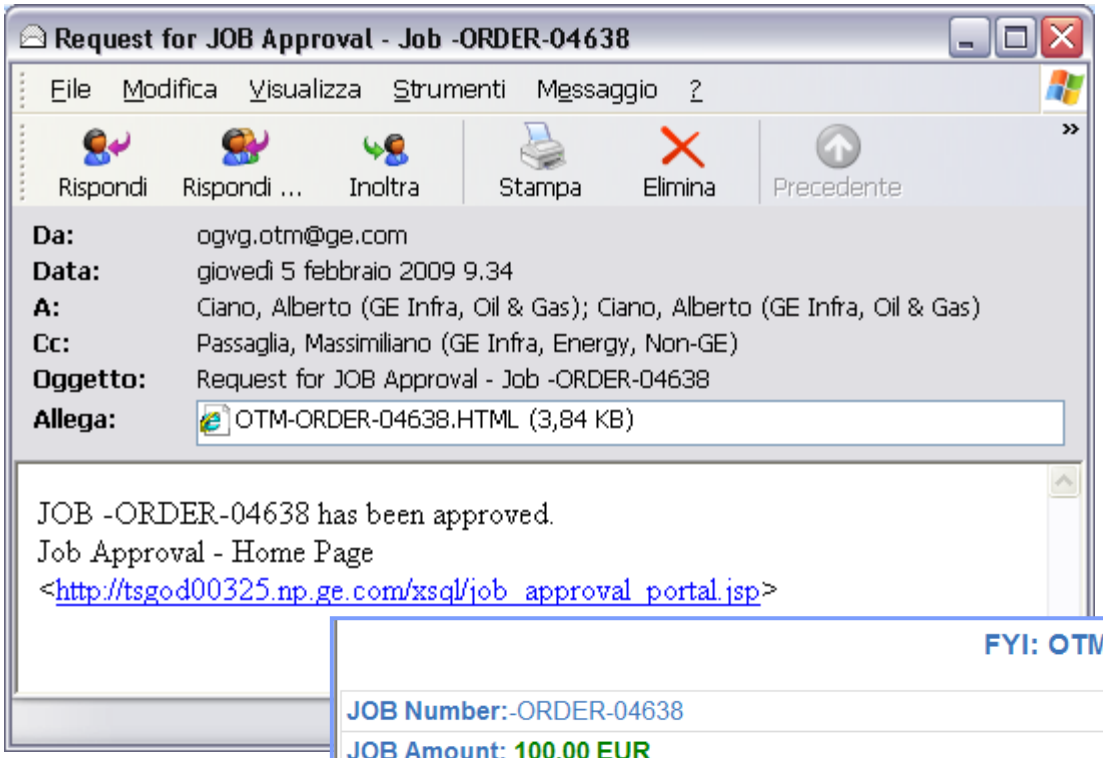
Button visible to approver only

Reason Code for Urgent RFT entered by the Requestor

Show Job with approval request for Premium

3.2 “Self-Approval”

Self-Approval



The Approver receives only a notification via mail.

FYI: OTM Request

JOB Number:-ORDER-04638
JOB Amount: 100.00 EUR
JOB Type: OUTBOUND
Requestor: COSTA DINALVA
Request Date: 05-FEB-09

Customer	Order Release	Weight	Dimension	Project	Pickup Date	Delivery Date	Price	Sell Shipment
VALLOUREC	20090204-000154	KG 8.00	H W L	SHIPPING INV. BJ02	05-FEB-09	06-FEB-09	100.00 EUR	0109908

Shipments Informations

Sell Shipment	From	To	Rate Type	Ship Unit	Price	Alternative
0109908	VETCO GRAY FRANCE	VALLOUREC	ALLYN_SPOT	1	100	

4.0 Out of Office Function

Out of Office Function

- The “Out of Office” function allows an existing APPROVER to define a temporary substitute to enable the Job Approval process to take place also if the requestor is out of office.
- The Out of Office request can be started only by a valid OTM APPROVER.
- Any other user type will receive an error message if she/he is not a valid APPROVER.
- The selected substitute will be added to the approval path of the requestor, so inheriting its DOA and Job Limits Amount.
- The requestor will continue to receive notification from JOB Approval process to remain updated about what is going on during his/her absence.

Note

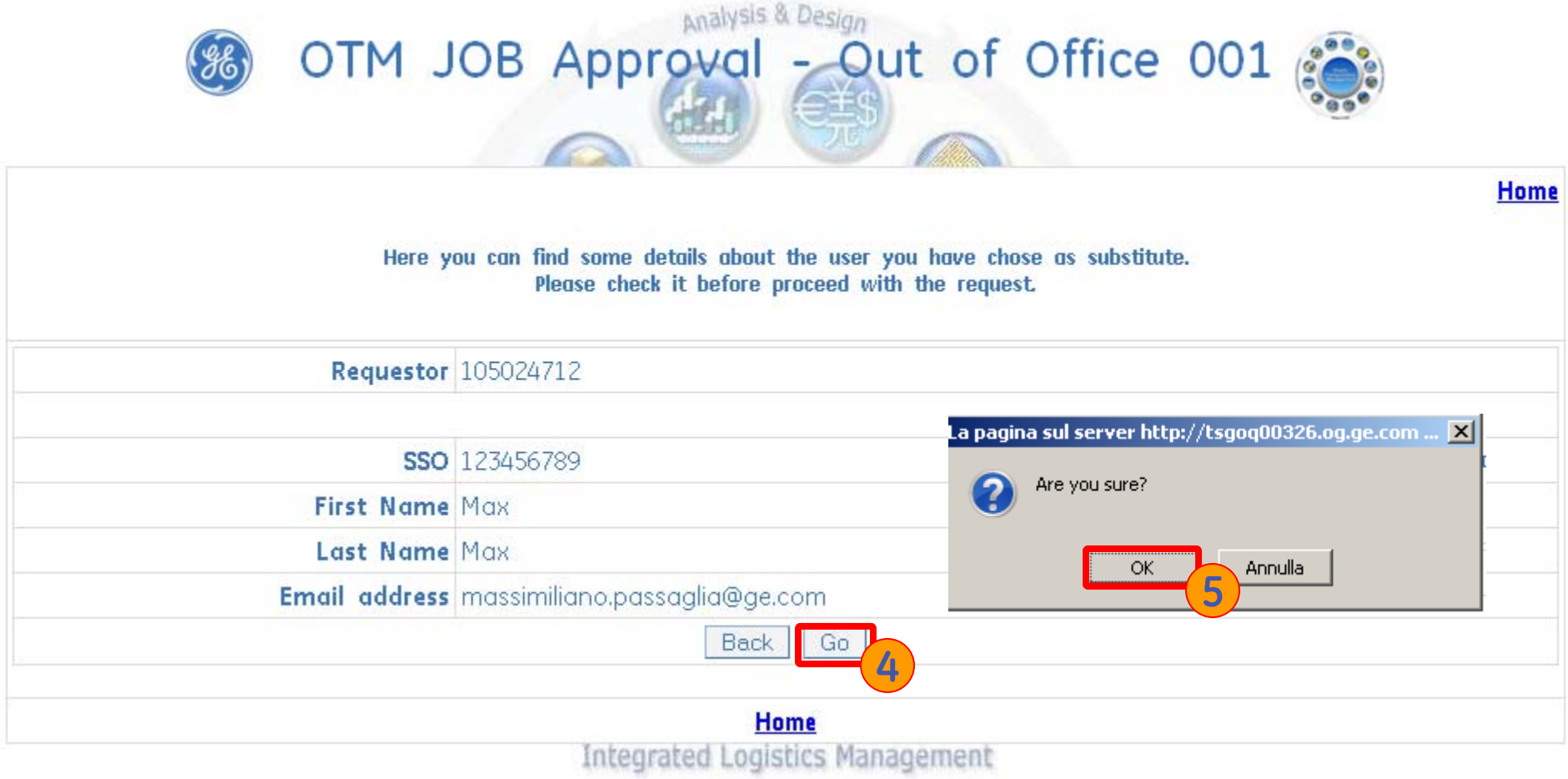
The Out of Office process can be requested only by a valid APPROVER inside OTM.

Out of Office Request

If the user is a valid APPROVER she/he can have acces to this admin page.This page shows main information as shown below:

Out of Office Request

If the SSO ID provided is related to a valid APPROVER the next screen will show detailed information about the selected substitute.



Out of Office Request

Substitution request is then processed and if no problem is found the following confirmation message is provided.

This means the nominated APPORVER is a registered CONTACT inside OTM and an email is sent to her/him to inform about the nomination.

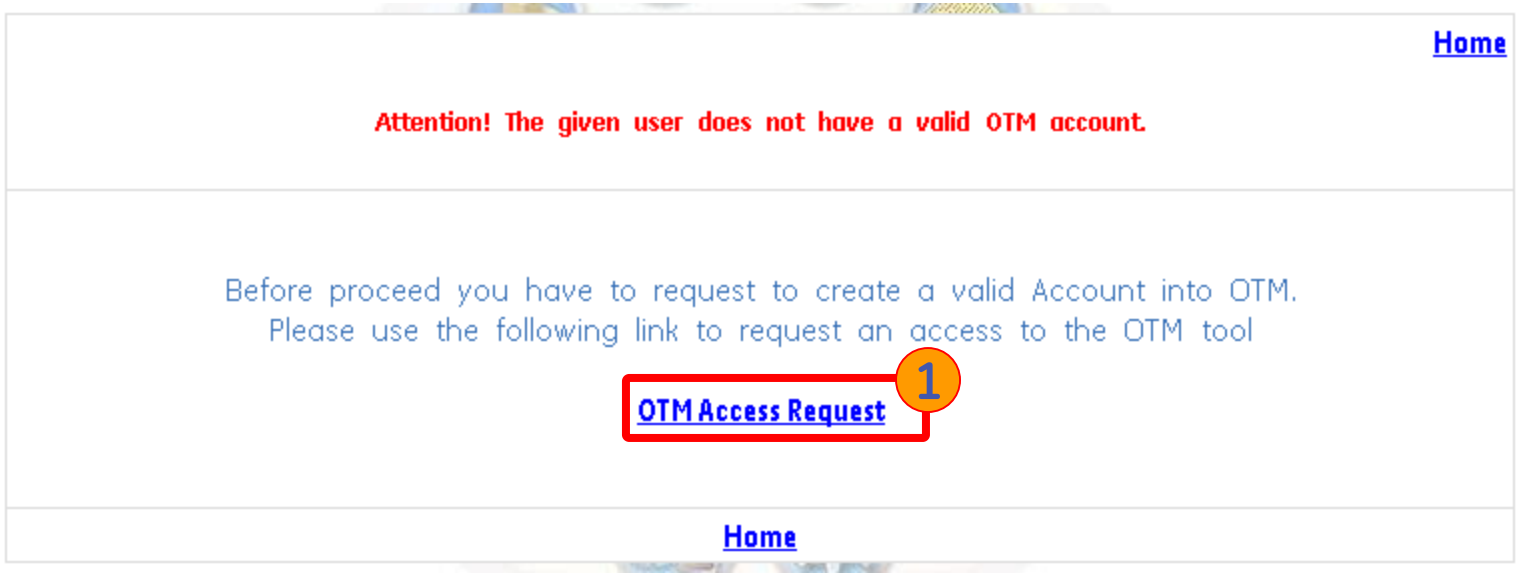
Out of Office Request

.At this point the connected user looks like “OUT OF OFFICE”

In the column “Substitute” the substitute previously defined is highlighted.

New Approver Creation

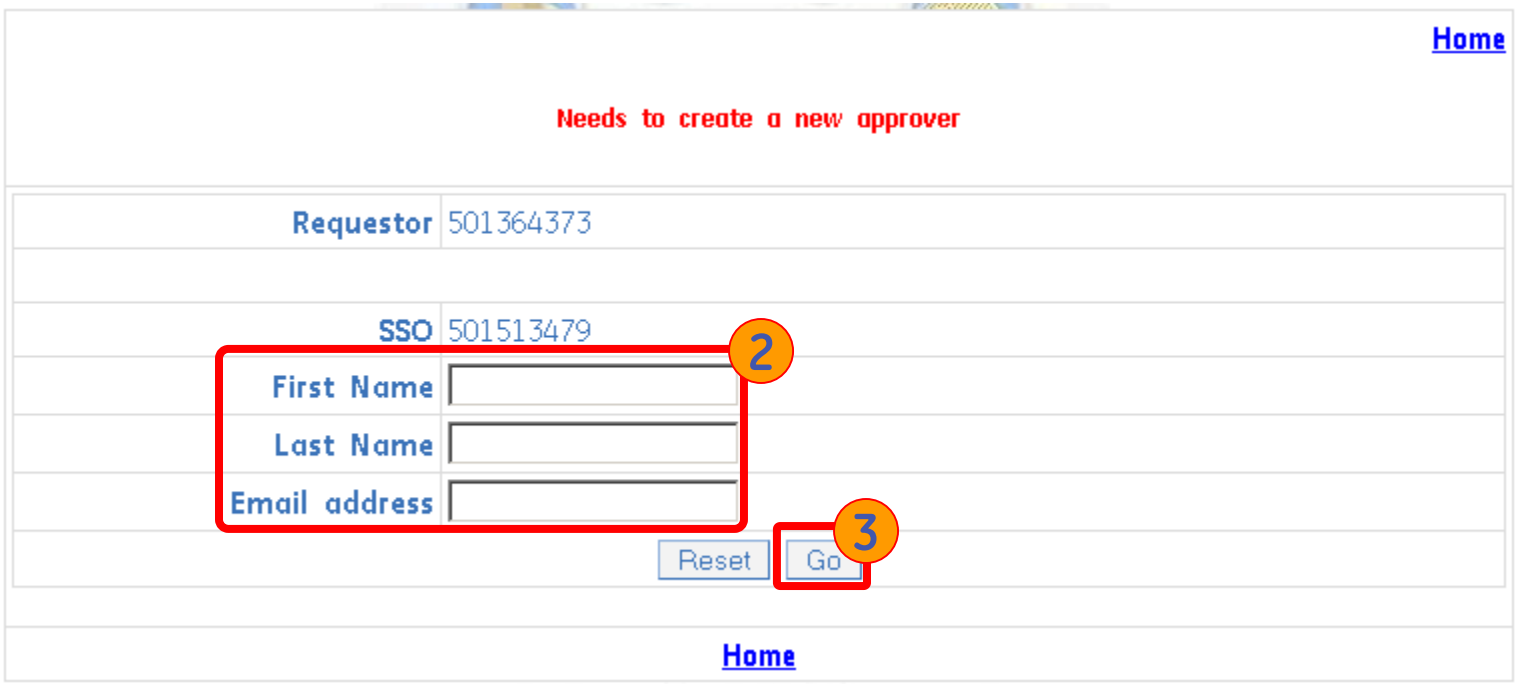
If the provided SSO it is not a registered CONTACT inside OTM the next step is to request an OTM account using the OTM Access Request workflow.


Home
Attention! The given user does not have a valid OTM account.
Before proceed you have to request to create a valid Account into OTM.
Please use the following link to request an access to the OTM tool
OTM Access Request
1
Home

New Approver Creation

If the provided SSO it is not an APPROVER but it is a registered CONTACT inside OTM the next screen is provided to disply information of the new APPROVER that will be created.

An email will sent to the selected APPROVER to inform her/him about the Approver nomitation process.



Disable the Out of Office

Requestor User is seen as in Out of Office. Column "Substitute" display the current substitute.

To disable the Out of Office the requestor need to select Go button.

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